

California Clean Energy Jobs Act Proposition 39 (K-12) Program

Energy Expenditure Plan Online Annual Progress Report

California Energy Commission
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09/17/2015



AGENDA

- 1. Proposition 39 (K-12) Program Reporting Requirements
- 2. Annual Progress Report Overview
- 3. Expenditure Plan Online Annual Progress Report Process



REPORTING REQUIREMENTS

- Reporting of each approved EEP is required
- Guidelines page 29 32
- Reporting will be done using the online system
- Annual Progress Report and Final Project Completion Report
 - This presentation will focus on the Annual Progress
 Report



ANNUAL PROGRESS REPORT NOTIFICATION

- E-mail notification using Listserv
- E-mail notification directly to the LEA Authorized Representative and Project Manager
- Notification on online system

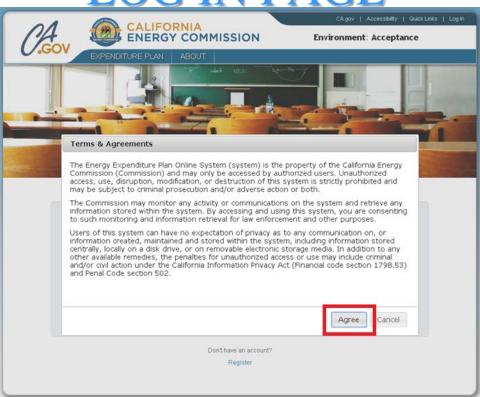


ANNUAL PROGRESS REPORT TIMELINE

- All Annual Progress Reports must be submitted each year as a condition of your award
- 2014-2015 Annual Progress Report is available now
 - Please submit by December, 2015
- For future fiscal years the Annual Progress Report will be made available in July
 - Please submit by September 31st of the same year







• The LEA will need to Agree to the Terms & Conditions to access the online system



REGISTER/LOG IN



• "Log In" Information

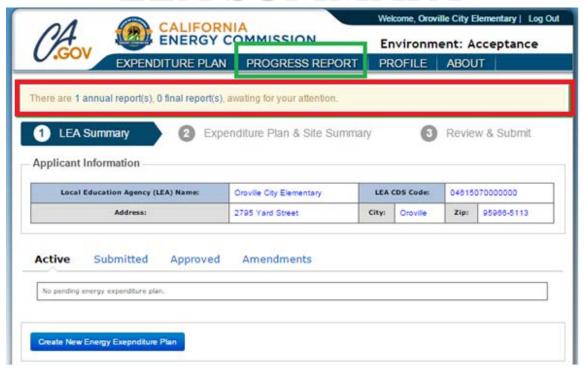
 If the LEA has previously registered and is returning to the system, the LEA can log in with the appropriate LEA Code and Password

• Log In

Use the Log In button to proceed to the LEA Summary page



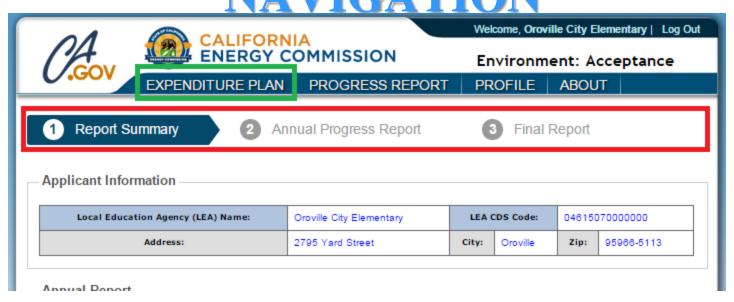
LEA SUMMARY



- Progress Report The LEA can navigate to the report section using this link
- There are 1 annual report(s), 0 final report(s) waiting for your attention This is a notification for the LEA if there are pending Annual Progress Reports. The LEA can navigate to the report section using these links



REPORT SUMMARY: NAVIGATION



- Expenditure Plan Use this link to navigate back to the LEA
 Summary page
- Report Summary/Annual Progress Report/Final Report This shows which section the LEA is working on



REPORT SUMMARY:

NAVIGATION (continued)

	Address:	2795 Yard Street	City:	Oroville	Zip:	95966-5113
Annual Report — Energy Expenditure F	Plan Submission ID: 4	142 2014-15		i.	Review B	
Grant Amount Reque Project SIR:	sted:	5236,972.00 37 nnual report for fiscal year 2014-15			Review F	=,
Approved		nnual report for fiscal year 2015-16			Review F	·
Pending	Α	nnual report for fiscal year 2016-17		(🕉 Edit Repo	ort

- Review EEP Use this link to navigate to review approved EEP (read only)
- Review Report Use this link to navigate to approved/submitted Annual Progress Reports (read only)
- Edit Report Use this link to navigate to an Annual Progress Report to fill out information



A Name:	Oroville City Elementary	Expenditu	re Plan Submittal Option:		Annual Awar	rd Energy Expendito	ure Plan
A Code:	04615070000000		Fiscal Year:		2014-15		
Tier:	4	Grant	Amount Requested:		\$236,972.00)	
neray M	anager and Training —						
			Amount Requested	L	A	mount Spent to Da	ite
Ar	mount Spent for Energy Manage	er	\$0.00		\$		
	Amount Spent for Training		\$0.00	T	\$		
chools/9	Sites Summary ————						
tatus	School/Site Name		CDS Code	Pi	roject Spent	Prop 39 Share Spent	
ompleted	Wyandotte Avenue Elementary		04615076094957			\$200,000.00	♂ Edit Detail
			Estimated Total:			\$200,000.00	
WC Num	Add						
	Name of Authorized Representa	tive:	/s/	*		Date mm/dd/y	yyy *

- Blue font indicates reference information from the approved EEP
- Use Save Current
 Process button to save
 changes made to the
 Annual Progress
 Report

Tier: 4	Grant Amount Requested:	\$236,972.00
Energy Manager and Training		
	Amount Requested	Amount Spent to Date
Amount Spent for Energy Manager	\$0.00	\$
Amount Spent for Training	\$0.00	\$

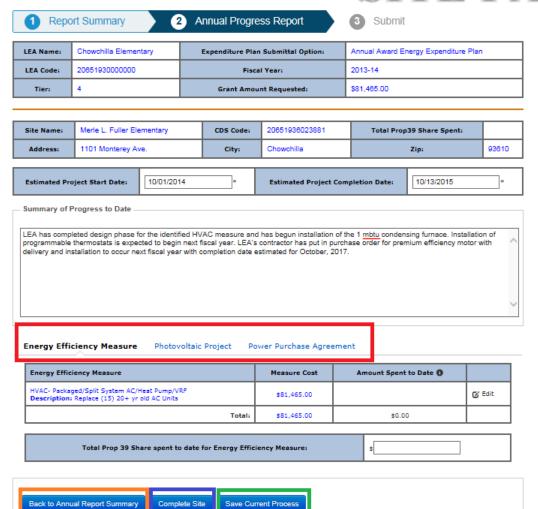
- Amount Spent for Energy Manager If the LEA requested funds for an energy manager please enter the amount spent to date. If no funds were requested this field will be disabled.
- Amount Spent for Training If the LEA requested funds for training please enter the amount spent to date. If no funds were requested this field will be disabled.

Schools/Si	tes Summary —				
Status	School/Site Name	CDS Code	Project Spent	Prop 39 Share Spent	
Completed	Wyandotte Avenue Elementary	04615076094957		\$200,000.00	♂ Edit Detai
		Estimated Total:		\$200,000.00	

- Schools/Sites Summary table lists all sites included in the approved EEP
- Edit Detail This link will take you to the Site Page to enter progress information for the selected site.
- Status All sites must be in "Completed" status to submit the Annual Progress Report
 - Pending: Additional information required for this site.
 - Completed: All required information has been entered for this site.







- Navigation to measure tables
- Use Save Current Process button to save changes made to the Annual Progress Report
- Use Complete Site when all information is entered
- Use Back to Annual Report Summary to return to the Annual Report Summary Page



Estimated Project Start Date:	10/01/2014 *	Estimated Project Completion Date:	10/13/2015 *
	cted to begin next fiscal year. LEA's	d has begun installation of the 1 mbtu condens s contractor has put in purchase order for pren estimated for October, 2017.	
			V

- Estimated Project Start/Completion Date Please update project start and completion dates as necessary.
- Summary of Progress to Date Provide a narrative of any progress in measure implementation.



Energy Efficiency Measure	Photovoltaic Project Powe	r Purchase	Agreement	
Energy Efficiency Measure		Measure Cost	Amount Spent to Date ①	
HVAC- Packaged/Split System AC/Heat Pump, Description: Remove inefficient 1975 multizo multi zone units.		\$351,862.00	\$200,000.00	♂ Edit
	Total:	\$351,862.00	\$200,000.00	
Total Prop 39 Share n	equested for Energy Efficiency Measure:		\$236,972.00	
Total Prop 39 Share spe	ent to date for Energy Efficiency Measure:		\$ 200,000.00	

- Amount Spent to Date For each energy efficiency measure please enter the amount spent to date (cumulative) including grant funds, rebates, other non-repayable funds, and repayable funds. Repeat this process for Photovoltaic and Power Purchase Agreement measures.
- Total Prop 39 Share spent to date for Energy Efficiency Measure Please enter the total Proposition 39 funds spent for all energy efficiency measures (this does not have to equal the total amount spent to date). Repeat this process for Photovoltaic and Power Purchase Agreement measures.

ANNUAL PROGRESS REPORT: SITE PAGE – Entering Amount Spent to Date

1. Select Edit

Energy Efficiency Measure	Measure Cost	Amount Spent to Date ①	
HVAC- Packaged/Split System AC/Heat Pump/VRF Description: Remove inefficient 1975 multizone units and replace them with high efficiency multi zone units.	\$351,862.00		⊘ Edit
Total:	\$351,862.00	\$0.00	

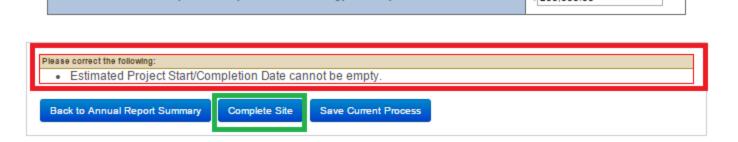
2. Enter value

Energy Efficiency Measure	Measure Cost	Amount Spent to Date ①	
HVAC- Packaged/Split System AC/Heat Pump/VRF Description: Remove inefficient 1975 multizone units and replace them with high efficiency multi zone units.	\$351,862.00	200000	✔ Update繁 Cancel
Total:	\$351,862.00	\$0.00	

3. Select Update or Cancel

Energy Efficiency Measure	Measure Cost	Amount Spent to Date 1	
HVAC- Packaged/Split System AC/Heat Pump/VRF Description: Remove inefficient 1975 multizone units and replace them with high efficiency multi zone units.	\$351,862.00	200000	✔ Update X Cancel
Total:	\$351,862.00	\$0.00	





- Complete Site When all information is entered use complete site button.
- Please correct the following If any information is missing when the complete site button is selected the LEA is notified. Address any errors and select complete site button.



- If the LEA has a DIR Project ID please provide it by entering the DIR Project ID and selecting Add
- A previously added DIR Project ID can be removed by selecting the "x" next to the number

	Type Name of Authorized Representative:	/s/ *	Date	mm/dd/yyyy *
	correct the following: Name of Authorized Representative cannot be Authorized Representative signature date con			
Bac	k to Report Summary Save Current Process	Review & Submit		

- Type in the name of the authorized representative and the date the Annual Progress Report is submitted
- Select Review & Submit button to submit Annual Progress Report to Energy Commission for review
- If any required information is missing when Review & Submit button is selected these are identified to the LEA



ANNUAL PROGRESS REPORT: SUBMISSION PAGE



By answering "No" to the following question...

. If the LEA has not completed the project an Annual Progress Report will be required to document progress over the fiscal year. The Annual Progress Report will be made available to the LEA to document progress until the project is completed.

By answering "Yes" to the following question...

. If the LEA has completed the project a Final Project Completion Report will be made available 12 months after the provided completion date. The LEA will need to fill out the Final Project Completion Report when it becomes available

Are all the project measures included in this Energy Expenditure installed?	e Plan completely	*	Date completed	
l Understand & Submit Cal	ancel & Return to perv	rvious page	e	

- Use the drop down selection to indicate if the project is complete (yes) or not complete (no)
- If the project is complete enter the completion date
- Use I Understand & Submit to finalize submission to the **Energy Commission.**
- Use Cancel & Return to previous page link to return to the Annual Progress Report



REPORT SUMMARY: STATUS

	Plan Submission ID: Expenditure Plan Submi Jested:	442 tted: 2014-15 \$236,972.00 1.37	Review EEP
Approved		Annual report for fiscal year 2014-15	☑ Review Report
Approved		Annual report for fiscal year 2015-16	
Pending		Annual report for fiscal year 2016-17	

- The status of each Annual Progress Report can be viewed on the Report Summary
- Status
 - Approved: Energy Commission CPM has reviewed and approved the Annual Progress Report
 - Submitted: The LEA has submitted the Annual Progress Report to the Energy Commission for review
 - Pending: The LEA must edit information in the Annual Progress Report and submit to the Energy Commission for review



ANNUAL PROGRESS REPORT

Questions?

Prop39@energy.ca.gov

Toll-free in CA (855)380-8722 Toll line outside CA (916)653-0392